



Washington State Transportation Commission

WSF Summer Recreational & Performance Survey

2018 Presentation



**Washington State
Transportation Commission**

Research Assurance LLC

Methodology



- ▶ The following report presents the findings for the 2018 Summer Recreational Survey.
 - The summer period ran from June 24th 2018 to September 29th 2018.
- ▶ The main objective of this research is to understand from the ferry riders' perspective, their summer travel behavior, as well as their level of satisfaction with WSF summer performance on key attributes.
 - This overall objective resulted in the following areas of exploration:
 - Summer travel activity – ferry travel from June through September 2018.
 - Social and recreational – understand role of ferries in the social and recreational summer travel.
 - Customer satisfaction – measure importance and satisfaction of terminal conditions, walk-on services, loading and unloading procedures, vessel conditions, and WSF website and telephone services.
 - Demographic characteristics of ferry customers – travel patterns, WSF satisfaction and demographic data.
- ▶ A total 4,925 ferry riders completed the Summer 2018 FROG Panel survey yielding a maximum sample variable of +/- 1.4% at the 95% confidence level.
- ▶ A total of 7,810 ferry riders were intercepted onboard and 704 completed the recreational travel portion of the Summer 2018 onboard intercept survey yielding a maximum sample variable for the recreational travel portion of +/- 3.7% at the 95% confidence level.
- ▶ In order to make the survey results proportionate to the ferry ridership universe as a whole, it was necessary to weight the data by route and boarding method based on their last trip taken.
 - Data was weighted by route/boarding mode/ticket type according to WSF actual traffic count for the summer period.



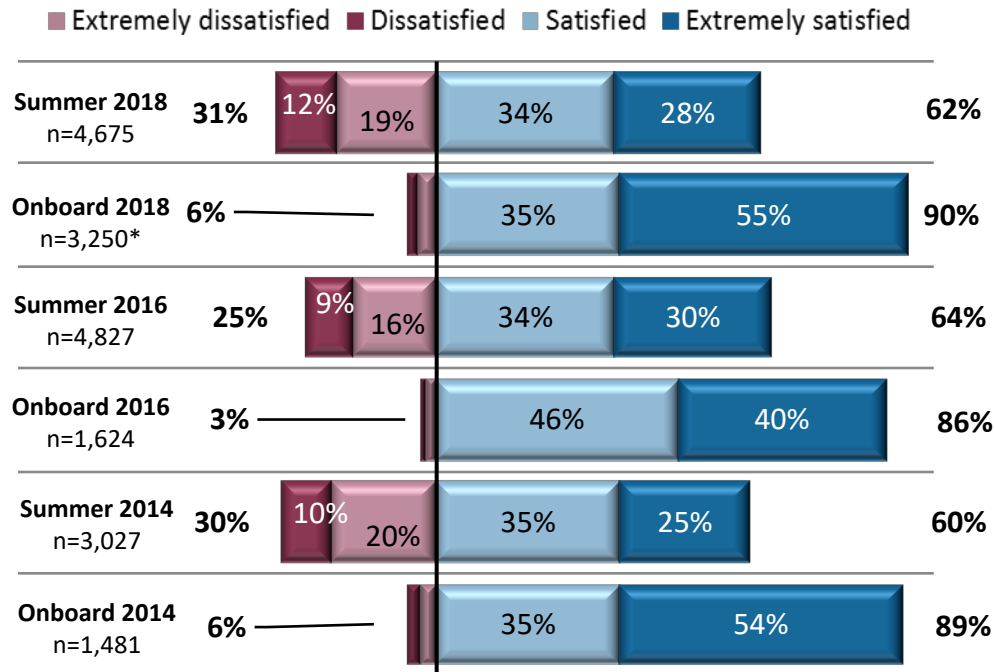
Summer Rider Satisfaction

Overall Satisfaction



The percentage of riders saying they are satisfied with the level of service provided by WSF during the summer months has slightly declined overall compared to 2016 (62% vs. 64%). Onboard survey respondents are more satisfied by a 28-point margin (90% vs. 62%). Those dissatisfied has increased (from 25% in 2016) to 31% of all summer FROG riders with dissatisfaction highest on the San Juan Interisland (45%), Fauntleroy/Vashon (44%) and Point Defiance/Tahlequah (39%) routes.

Overall Satisfaction with WSF



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown,
Ratings of 3 or don't know are not shown.

The **bold** percentages represents the corresponding total dis/satisfaction

* Onboard 2018 represent all non-FROG intercepted riders

Overall Dissatisfaction by Route

(Total dissatisfied - 2018)

		2016	Shift
SJII n=61	45%	26%	+19%
FAU/VAS n=366	44%	43%	+1%
PTD/TAH n=99	39%	23%	+16%
ANA/SJI n=1,283	36%	23%	+13%
SEA/BAIN n=873	32%	22%	+10%
FAU/SOU n=188	30%	34%	-4%
MUK/CLI n=683	30%	30%	0%
COU/PTT n=234	27%	19%	+8%
EDM/KIN n=485	25%	24%	+1%
SEA/BREM n=330	23%	23%	0%
SOU/VAS n=32	22%	21%	+1%
ANA/BC n=41	12%	18%	-6%

Q20. For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Summer period. All things considered, how satisfied are you with the service provided by Washington State Ferries during the Summer period?

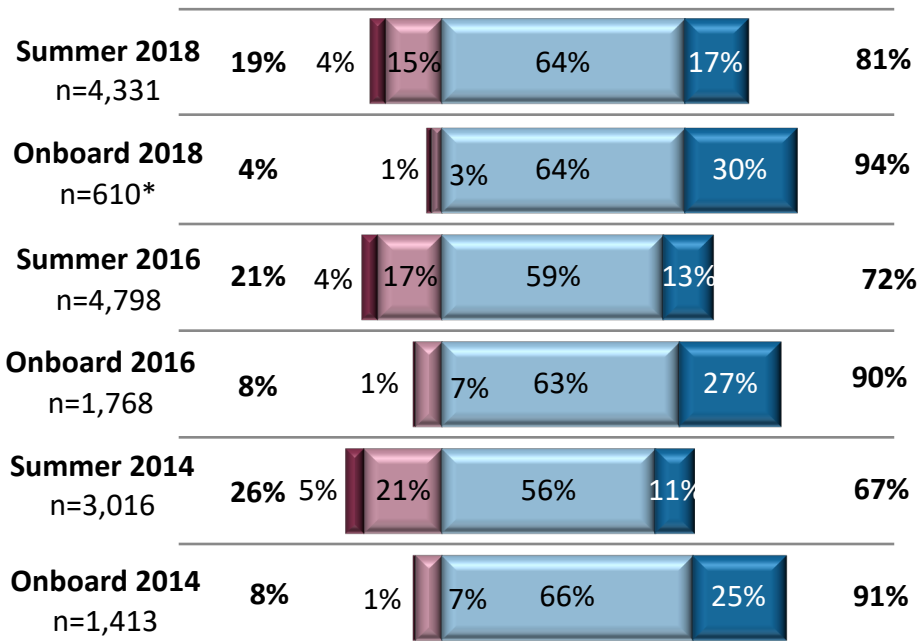
Overall Value



The percentage of riders saying WSF is a “good” or “very good” value in the 2018 summer period has increased compared to 2016 (81% vs. 72% respectively). Overall good value is up from summer 2016 across all routes except Southworth/Fauntleroy, Fauntleroy/Vashon, and San Juan Interisland. The most significant increases over 2016 was among riders using Seattle/Bremerton and Mukilteo/Canton routes.

Overall Perceived Value of WSF

■ Very poor value ■ Poor value ■ Good value ■ Very good value



Only ratings of good or poor are shown, don't know responses are not shown.

The **bold** percentages represents the corresponding total good/poor value

* Onboard scores represent only those non-FROG recreational riders intercepted

Overall 'Good Value' by Route

(Very good + Good value)

		2016	Shift
COU/PTT n=234	92%	83%	+9%
ANA/BC n=41	91%	84%	+7%
SEA/BREM n=330	90%	79%	+11%
MUK/CLI n=682	83%	73%	+10%
FAU/SOU n=188	83%	77%	+6%
SEA/BAIN n=873	83%	74%	+9%
ANA/SJI n=1,282	78%	70%	+8%
EDM/KIN n=484	78%	69%	+9%
PTD/TAH n=99	73%	72%	+1%
SOU/VAS n=32	72%	75%	-3%
SJII n=61	64%	74%	-10%
FAU/VAS n=366	58%	60%	-2%

Q26. For the Summer period, do you feel that Washington State Ferries is...?

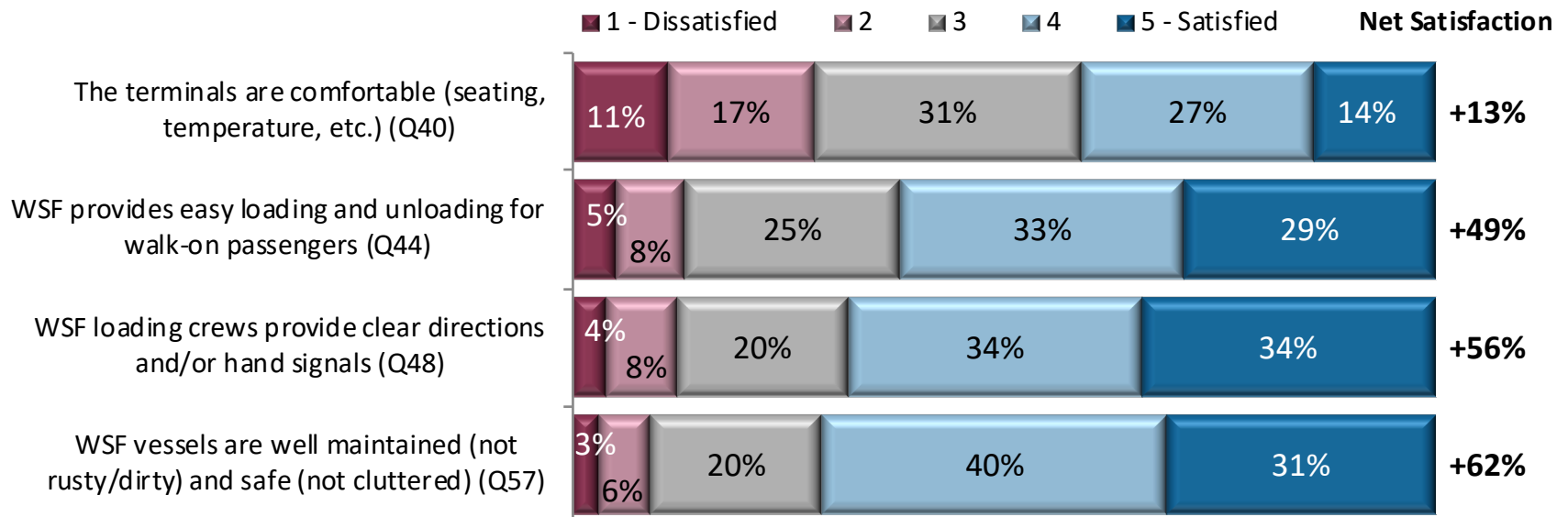
Satisfaction by Attribute - Tracking



Satisfaction across all four attributes remains positive. Total dissatisfaction remains consistent with 2016 at about 10% for “easy loading/unloading,” “clear directions,” and “well maintained vessels” but has increased sharply for “terminal comfort” (12 percentage points greater dissatisfaction – now at 28%).

- ❖ The following table presents an overview of the following slides containing the quad chart analysis
- ❖ The following table shows the total dissatisfaction (1-2) of each individual attribute, relative to the 2016 dissatisfaction.
 - The **Shift** is 2018 dissatisfaction minus 2016 dissatisfaction

Attributes	Summer Total Dissatisfaction		
	2018	2016	Shift
Terminals are comfortable	28%	16%	+12%
WSF provides easy loading and unloading for walk-ons	13%	14%	-1%
WSF loading crews provide clear directions and/or hand signals	12%	11%	+1%
WSF Vessels are well maintained and safe	9%	11%	-2%



Terminals are comfortable



Dissatisfaction with terminals' comfort is highest among Seattle/Bainbridge (48%), Seattle/Bremerton (44%), Anacortes/SJI (25%), and Edmonds/Kingston (20%) routes. The dissatisfaction is greatest among the Seattle terminal users.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Sat. Respondents		3,306	767	270	67	313	278	139	27	185	425	768	38	29
Terminals are comfortable (2018)	Imp. (4-5)	69%	77%	76%	58%	71%	50%	64%	52%	61%	67%	61%	39%	74%
	Sat. (4-5)	41%	27%	23%	59%	50%	48%	55%	47%	60%	60%	39%	44%	57%
	Dissat. (1-2)	28%	48%	44%	5%	20%	12%	12%	9%	10%	10%	25%	13%	12%
2016	Dissat.	16%	24%	25%	9%	9%	8%	4%	4%	6%	7%	24%	5%	14%
Change	Dissat.	+12%	+24%	+19%	-4%	+11%	+4%	+8%	+5%	+4%	+3%	+1%	+8%	-2%

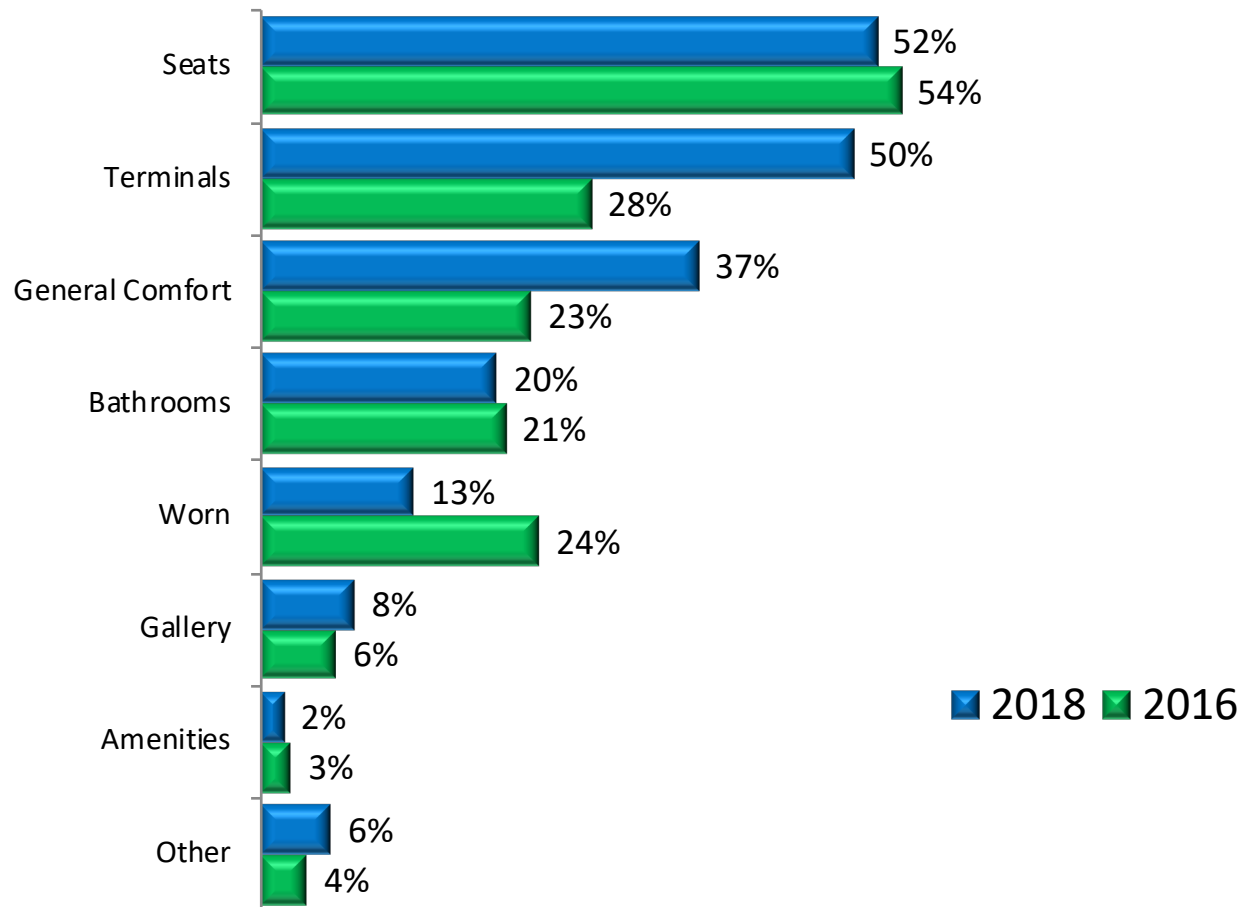
Top 3 Unsatisfactory Terminals	
Seattle	77%
Bainbridge	9%
Anacortes	9%

Example of Verbatim Complaints	
Seattle	#1 There is not enough seating and it's uncomfortable. #2 The women's bathroom is disgusting. The doors are cut so low that it is humiliating to use the toilet. There are no toilet seat covers and no paper towels.
Seattle	As an elderly passenger the horrible terminal conditions mortify me. Lack of seating is torture.
Seattle	Construction makes the terminal crowded and has no seating. People who do not usually ride the ferry have no idea what they are doing and just stand around in the way.
Seattle	Line for Bainbridge inside terminal was hot with small fans and tight lines, no place to sit, announcer telling people to cram forward. Awful. Feels like a third world terminal now.
Seattle	The terminal is a zoo; there is not enough seating or standing area; the bathrooms are awful; there are not enough retail facilities
Seattle	Workers are rude and inconsistent. Restrooms are dirty and terminal is either hot with fans not running or cold with fans not running too often.
Anacortes	Hard seats are very uncomfortable and terminal is unkempt, bathrooms are often dirty
Anacortes	The terminal just like the ferries themselves are shabby and run-down. The food and refreshment options are abhorrent. The bathrooms are disgusting and they customer service is non-existent at best.

Terminal Issues Mentioned



Seating (52%) is the top complaint among people who are dissatisfied with terminal comfort. More over, negative comments about general terminal conditions (50%) has almost doubled since 2016 (when it was 28%).



Q42b. What specific conditions (about the terminal) made you dissatisfied? (Multiple Response, n=781)

WSF provides easy loading and unloading for walk-ons



Dissatisfaction is highest for Seattle Bainbridge (23%), Seattle Bremerton (14%), and Fauntleroy/Southworth (14%) routes.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Sat. Respondents		2,808	750	258	66	291	232	108	25	112	395	523	30	18
WSF provides easy loading and unloading for walk-ons (2018)	Imp. (4-5)	88%	91%	90%	82%	87%	85%	89%	96%	91%	88%	79%	76%	99%
	Sat. (4-5)	61%	48%	55%	65%	69%	76%	70%	88%	85%	67%	65%	82%	100%
	Dissat. (1-2)	13%	23%	14%	2%	9%	7%	14%	3%	4%	11%	5%	2%	0%
2016	Dissat.	14%	21%	16%	10%	6%	7%	10%	0%	5%	15%	8%	5%	4%
Change	Dissat.	-1%	+2%	-2%	-8%	+3	0%	+4%	+3%	-1%	-4%	-3%	-3%	-4%

Top 3 Unsatisfactory Terminals	
Seattle	69%
Bainbridge	18%
Bremerton	9%

Example of Verbatim Complaints	
Seattle	I feel like a trapped rat looking for cheese as we meander through the hallways or stand crammed into the space with few seats, waiting for habitually late boats....
Seattle	Late ferries, narrowing of the line, and taking too long. Walk on passengers should load once the main cabin is clear and swept. We should not wait for cars to unload.
Seattle	The 2 lanes for Bremerton and Bainbridge are very confusing and we don't get enough turnstiles to load because sometimes we load at the same time.
Seattle	We were told that everybody would make it on, but frequently last call was made before even half the terminal was even loaded. All this does is create individuals to push.
Seattle, Bainbridge	It takes forever to unload at either end. Seriously, it's the worst!!! It takes nearly as long as the ride itself. This could be easily fixed with a dual sided exit set up.
Seattle, Bremerton	In Bremerton, you can't get close to being dropped off unless you have a handicap sign. In Seattle, with all of the construction at the terminal and the viaduct it's a mess and constantly changing.
Southworth	It would be nice to let the passengers waiting in the rain, weather, to load multiple times. Or at least build a shelter area for all the people to stand.

WSF loading crews provide clear directions / hand signals



Dissatisfaction with WSF loading crews provide clear directions is highest in Point Defiance/Tahlequah (24%), Fauntleroy/Vashon (20%), and Interisland (25%) routes.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Sat. Respondents		4,344	741	262	98	458	359	171	28	219	670	1,239	60	39
WSF loading crews provide clear directions/ hand signals (2018)	Imp. (4-5)	93%	93%	94%	93%	90%	96%	97%	95%	94%	93%	94%	92%	100%
	Sat. (4-5)	68%	75%	74%	50%	67%	49%	71%	71%	81%	69%	63%	57%	83%
	Dissat. (1-2)	12%	10%	7%	24%	9%	20%	11%	16%	7%	12%	17%	25%	14%
2016	Dissat.	11%	9%	8%	20%	8%	17%	15%	6%	9%	14%	13%	22%	2%
Change	Dissat.	+1%	+1%	-1%	+4%	+1%	+3%	-4%	+10%	-2%	-2%	+4%	+3%	+12%

Top 3 Unsatisfactory Terminals	
Seattle	25%
Fauntleroy	21%
Mukilteo	17%

Example of Verbatim Complaints	
Fauntleroy	2 deck hands each pointing a different direction
Fauntleroy	3 people on the deck, but no two people used the same methods of direction. When driver stopped to clarify, they were yelled at to follow extremely conflicting instructions.
Fauntleroy	Every deck person has a different system and they get frustrated when people cant tell what they want them to do.
Anacortes	It seems that the ferry employees that are hardest to figure out are the same ones that get upset when drivers don't know what they want them to do.
Mukilteo	Not enough crew onboard directing cars HOW to park. Results in extra space so fewer vehicles on board and longer wait times.
Pt Defiance, Tahlequah, Fauntleroy	Deck hands often seem to assume drivers can read their minds. I commuted for 28 years and have a fair idea of what is expected, but inattention and vague hand signals are confusing. Also, the red/green light at Tahlequah is rarely cycled, use it right or turn it out!
Orcas, Anacortes	Rudeness and lack of experience by employees directing for parking.

WSF Vessels are well maintained and safe



Dissatisfaction with WSF vessels being well maintained and safe is highest in San Juan Interisland (19%), Anacortes/San Juan (14%) and Seattle/Bremerton (14%) routes.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Sat. Respondents		4,410	831	314	89	453	333	183	31	222	620	1,235	59	40
WSF Vessels are well maintained and safe (2018)	Imp. (4-5)	93%	94%	93%	89%	91%	89%	92%	98%	94%	95%	95%	90%	100%
	Sat. (4-5)	71%	70%	61%	82%	69%	75%	65%	84%	85%	83%	63%	47%	76%
	Dissat. (1-2)	9%	10%	14%	8%	9%	7%	8%	6%	5%	3%	14%	19%	5%
2016	Dissat.	11%	12%	26%	8%	12%	3%	4%	7%	5%	4%	15%	10%	10%
Change	Dissat.	-2%	-2%	-12%	0%	-3%	+4%	+4%	-1%	0%	-1%	-1%	+9%	-5%

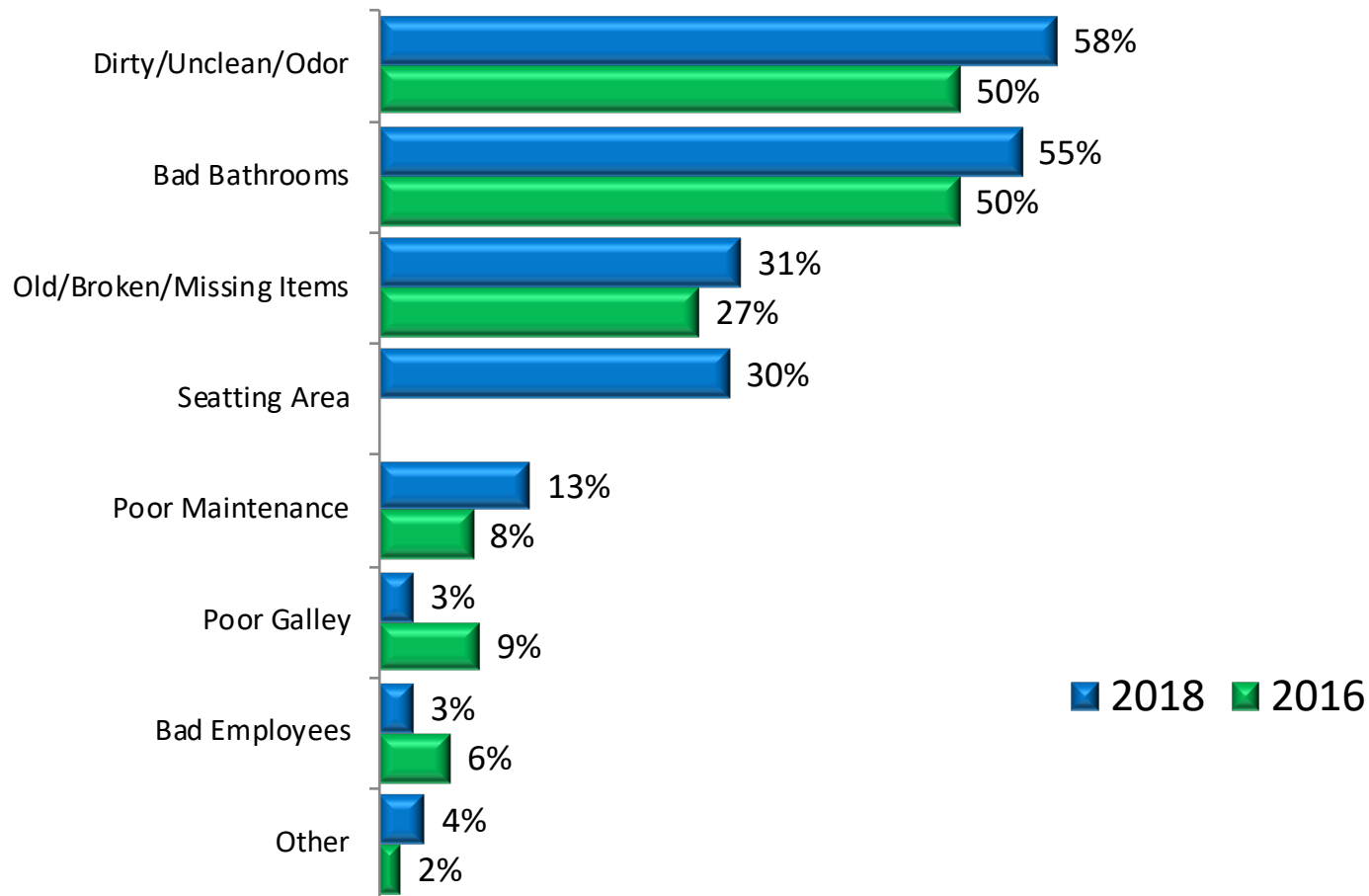
Top 4 Unsatisfactory Vessels	
Don't recall name	43%
Chimacum	12%
Tacoma	11%
Wenatchee	9%

Example of Verbatim Complaints	
Chimacum	No wi-fi, seats too crowded, no place to sit. People lie on bench seats. Seats too far from tables, galley is packed and crowded - no place to sit. Too hot. No hooks for bags or jackets. Floor tiles peeling up. The outside seats are even worse than inside.
Chimacum	Cramped cabin space -worn out / uncomfortable seats - BAD CELL RECEPTION - Poorly designed galley and eating areas. Bathroom on upper deck has been closed for weeks.
Tacoma	Restrooms dirty, leaky toilets, dirty passenger seats
Tacoma	The water sensors in the women's head at the sinks hardly work. Can those be tuned up? The sensors in the Wenatchee work really well.
Wenatchee, Tacoma	On both boats, the men's bathroom's were dirty/unmaintained and there was visible urine on the floor in various areas around the toilets. The automatic sinks were hard to use. Other than that the rest of the boats were very nice and clean.
Wenatchee, Tacoma	Overall condition of boat and bathrooms is shabby at best and just dirty at worst.

Vessel Issues Mentioned



General dirty/unclean/odor (58%) and bad bathrooms (55%) are the top two complaints among people who are dissatisfied.



Q59c. What specific (vessel) conditions made you dissatisfied? (Multiple Response, n=425)

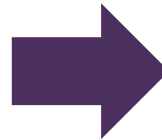
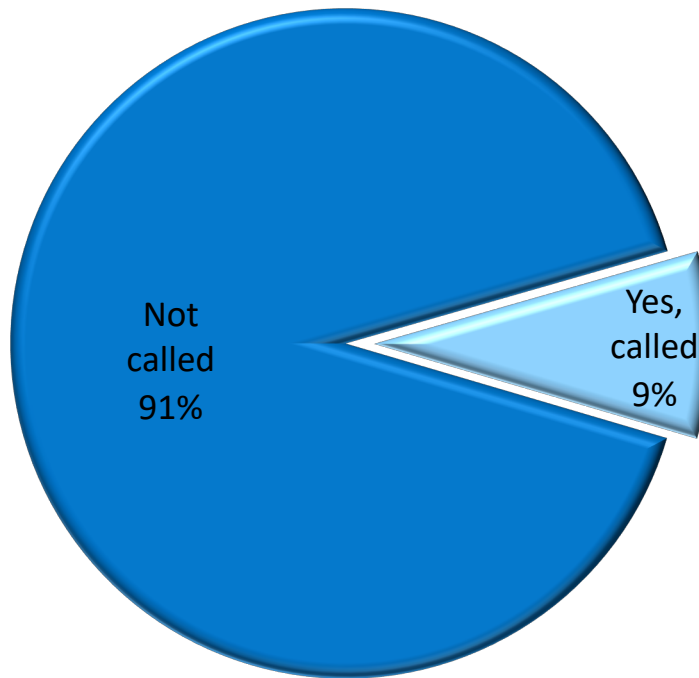
Calling WSF Customer Service by Phone



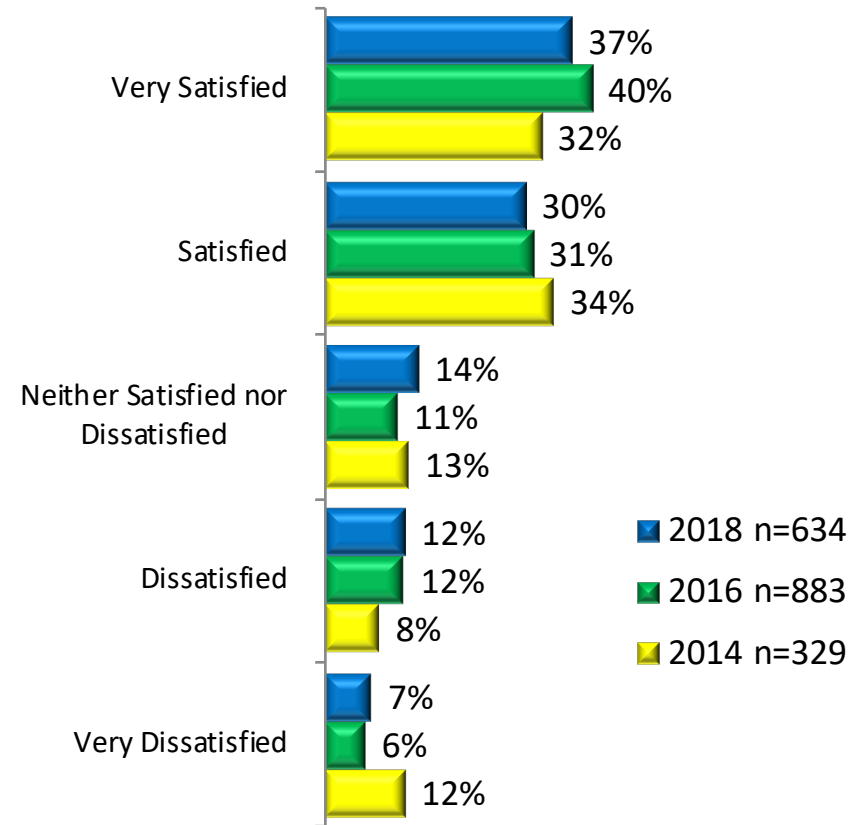
Very few respondents (9%) have contacted WSF customer service by phone. Of those respondents who have called, the majority are satisfied with their experience (67%). However, almost one in five (19%) are dissatisfied with their call.

Called WSF Customer Service

n=4,672



Experience Calling WSF



Q65B. During the Summer period, have you for any reason called WSF by phone?

Q68. How satisfied were you with your experience calling the WSF by phone?



Recreational & Social Travel During Summer Period

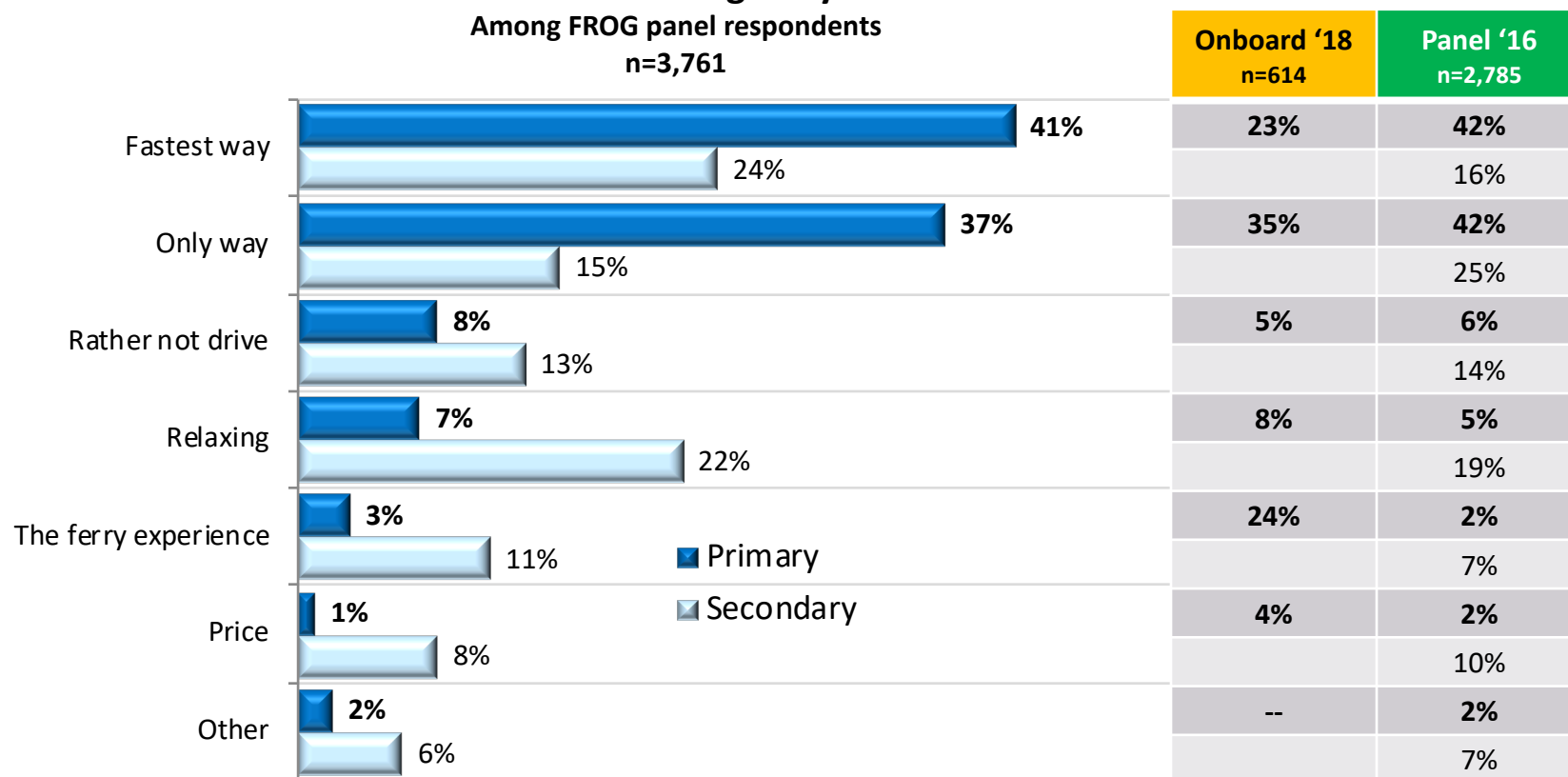
Factors Driving Ferry Decision



Both panel and onboard respondents say “fastest way” and “only way” are the primary reasons for choosing WSF for their recent recreational or social trip. A secondary reason is it is a “relaxing way to travel.” Onboard respondents also listed the “uniqueness of the ferry experience” as a top reason as well.

Factors determining ferry travel

Among FROG panel respondents
n=3,761



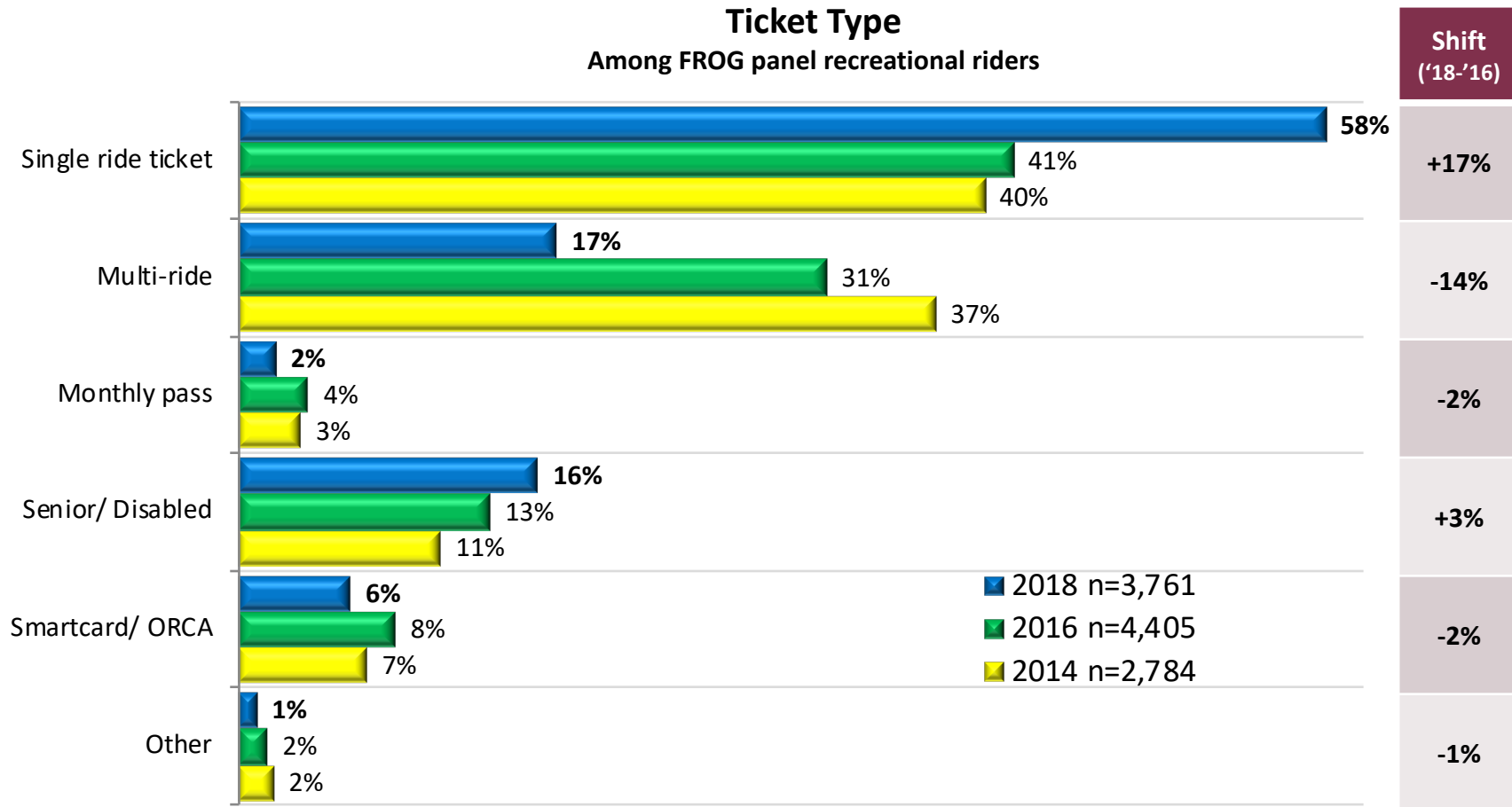
Q15a. Which of the following reasons best describes why you chose WSF rather than some other way to make your most recent recreational or social trip?

Q15b. Which other reasons describe why you chose WSF rather than some other way to make your most recent recreational or social trip? (Multiple Response)

Ticket Type



Summer recreational riders are likely to use single ride tickets more than multi-ride tickets when traveling. Since 2014 there has been a downward shift in multi-ride ticket type usage (dropping from 37% to 17%) while single ride tickets increased from 40% to 58%. Single ride tickets are more often used on Seattle/Bainbridge (66%) and Seattle/Bremerton (69%) routes.



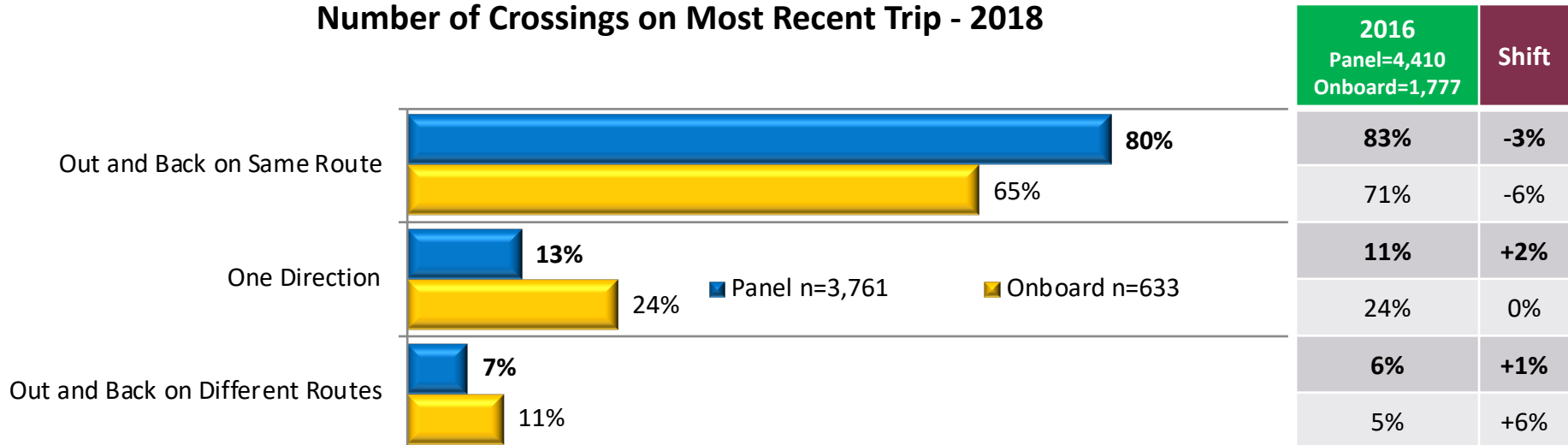
Q8. On what kind of ticket were you travelling?

Crossings and Trip Duration



Out and back on the same route is the most popular crossing for both panel and onboard recreational riders in both 2018 and 2016. Anacortes/San Juan (5.3 days) and Anacortes/Sidney (5.1 days) continue to have the longest mean trip duration with Seattle/Bremerton (1.5 days) having the shortest. Non-FROG summer recreational riders trip duration is 5.6 days.

Number of Crossings on Most Recent Trip - 2018



Trip Duration		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
2018 Respondents		3,761	700	243	73	386	274	151	27	209	533	1,076	51	38
2018 FROG	Mean number of days	2.5	2.2	1.5	2.6	2.1	1.8	1.7	1.6	3.3	2.3	5.3	4.4	5.1
2016 FROG	Mean number of days	2	2	1	1	2	2	1	1	3	2	4	2	4
2014 FROG	Mean number of days	2	2	1	2	2	2	1	2	3	2	4	2	5
2018 Onboard	Mean number of days	5.6	Based on the 633 intercepts with non-FROG summer recreational riders: This trip was the first WSF ride for 25% of them. There were 2.9 people on average in their traveling unit.											

Q11. How many crossings or sailings on Washington State Ferries (WSF) did you take?

Q10. What was the duration (# of days from when you left home to when you returned home) of the trip?

Destination & Relative Ferry Cost

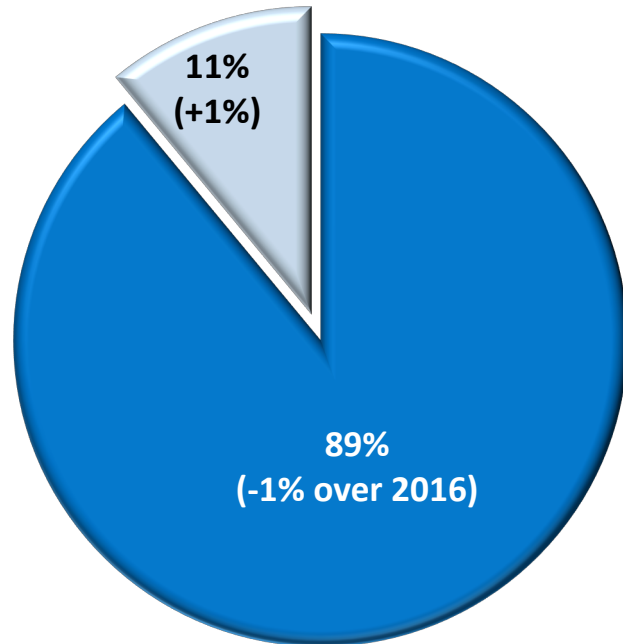


Most respondents say their most recent recreational or social trip was a WA State only trip. The ferry fare as a percent of total recreational/social trip cost is significantly higher for panel members than for non-FROG respondent (those intercepted on-board). However, the ferry fare as a percentage of the total trip costs has declined since 2016 for both panel members and onboard riders.

**Destination of Last
Recreational/Social Trip**

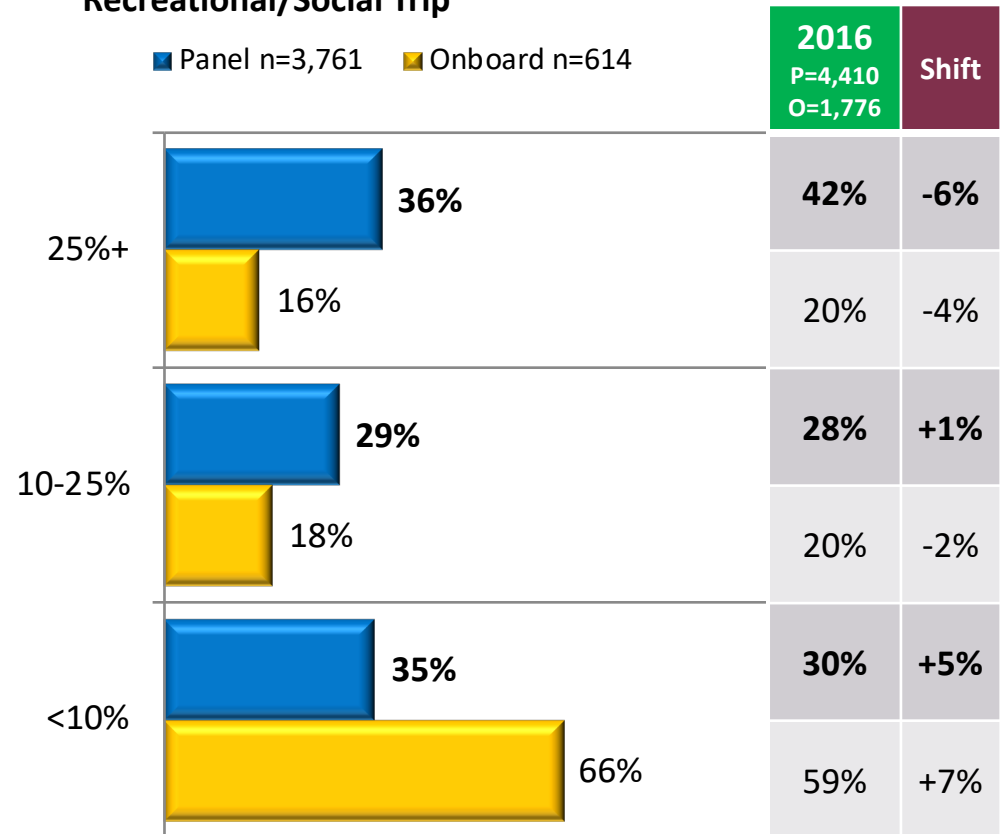
n=3,761

■ Washington State ■ Multistate/Multination



**Relative Cost of Last
Recreational/Social Trip**

■ Panel n=3,761 ■ Onboard n=614



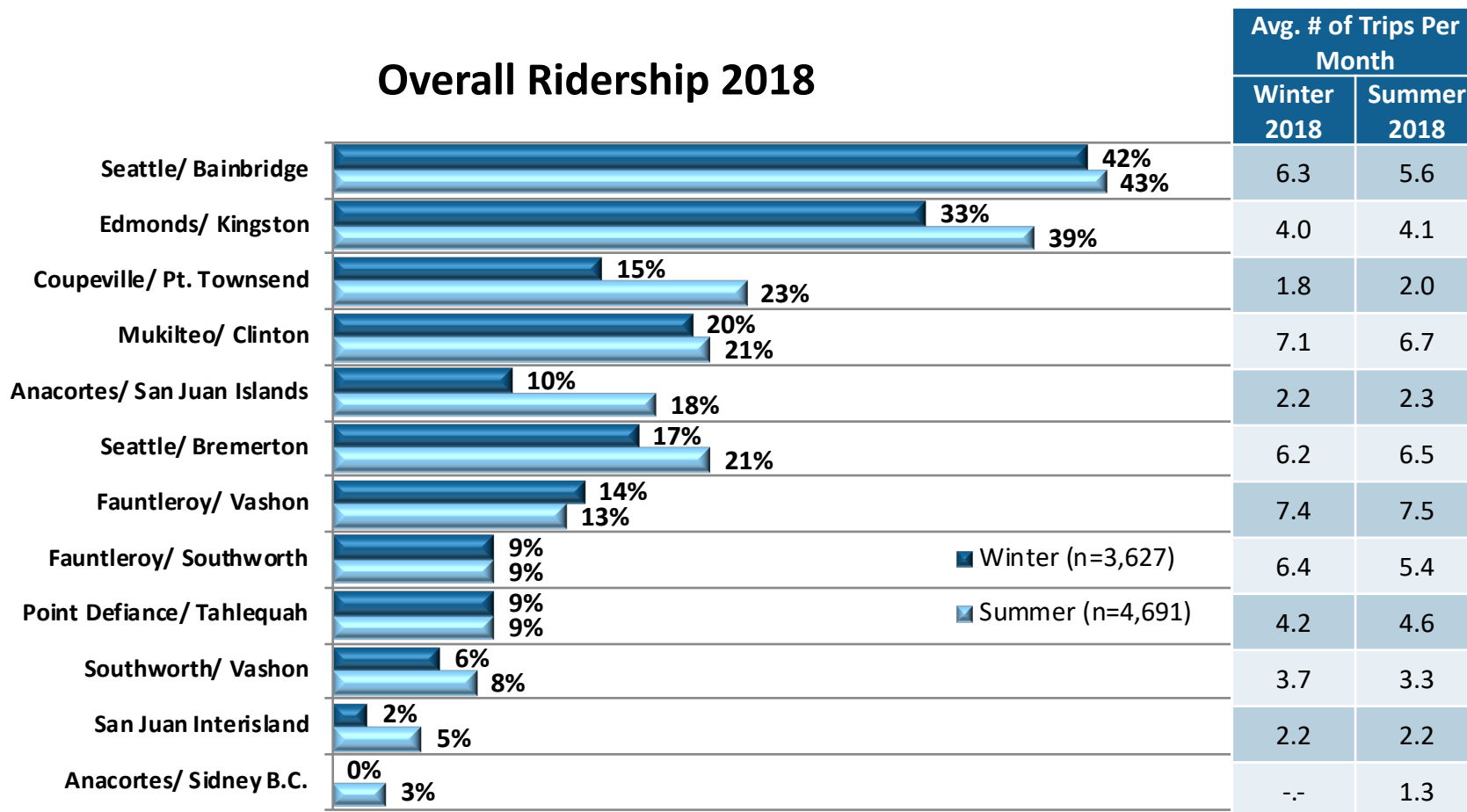
Q13. Was your most recent recreational or social trip part of a...?

Q14. How significant was the ferry fare to the total cost (gas/food/lodging/etc.) of your most recent trip?



The Coupeville/Port Townsend and Anacortes/San Juan routes experience the most change between winter and summer travel periods (both up 8 percentage points) followed by Edmonds/Kingston (up 6 percentage points).

Overall Ridership 2018



Q2. Which of the following route(s) have you ridden during the Winter period (January 7th through March 31st 2018)? [CHECK ALL THAT APPLY]

Q3. To get an idea of how people are using the ferry system in the winter months, could you please give us a guesstimate for the route(s) shown below - how many round trips (two one-way trips = one round trip) per month you take during the Winter period?

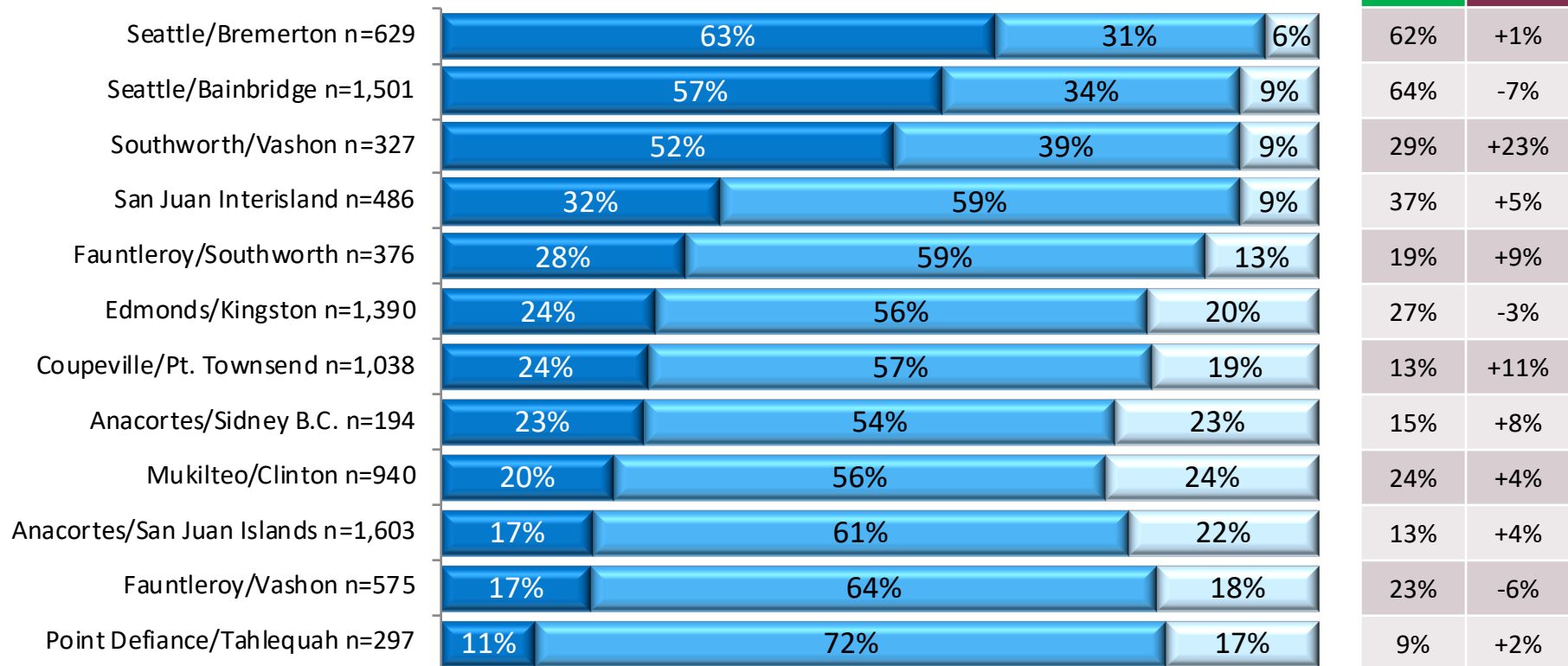
Boarding Method



Seattle/Bremerton (63%), Seattle/Bainbridge (57%) and Southworth/Vashon (52%) have the highest proportion of walk-on travelers; on all other routes, drive-on has a majority percentage.

Ratio of Trips by Boarding Method

■ Walk-on ■ Drive-on ■ Passenger

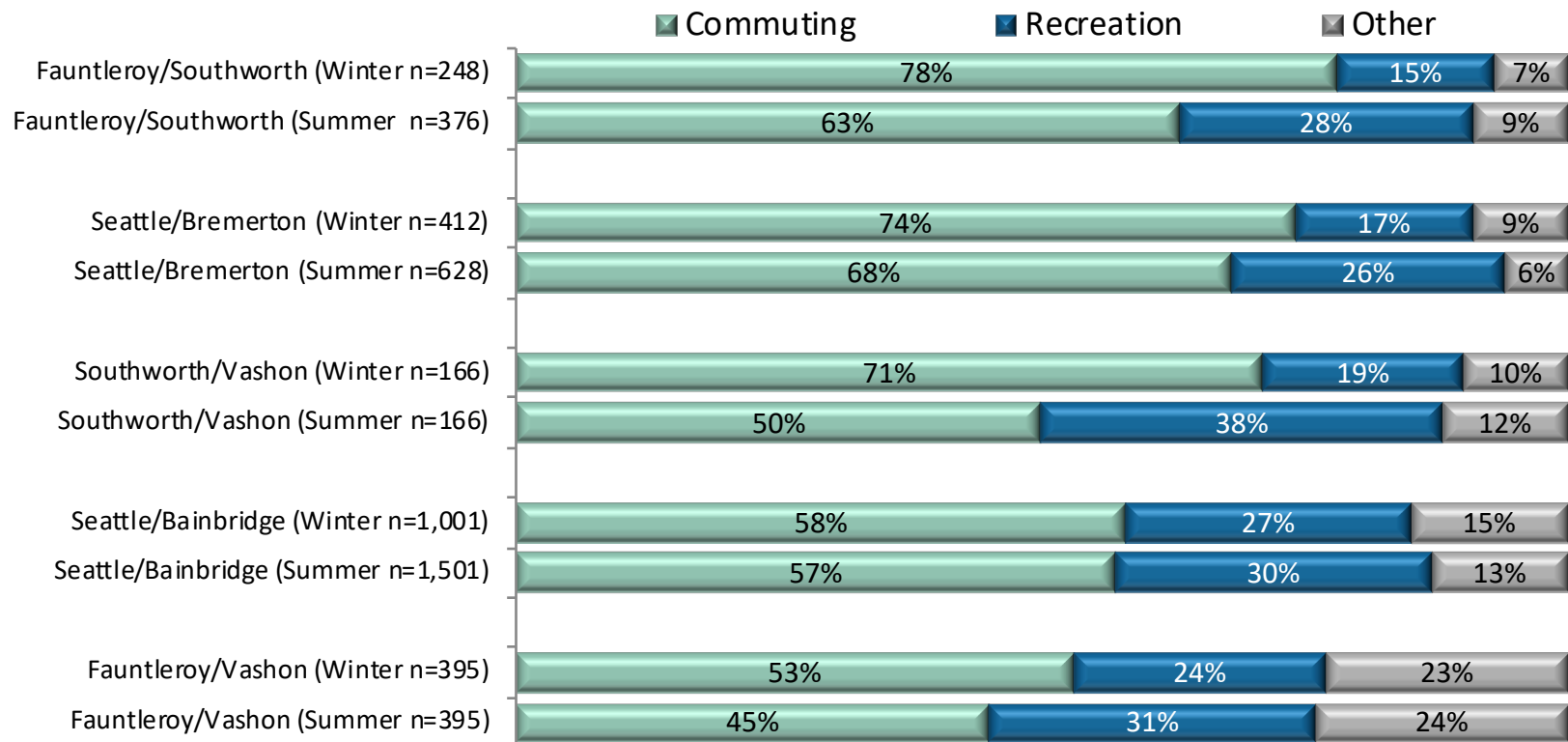


Q25. During the Summer period ... How many of your ferry trips per month for each route were boarded using the following methods?



All routes saw a change in the trip purpose between seasons. The least likely to see a change is the Seattle/Bainbridge route.

Trip Purpose by Route by Season (1 of 2)

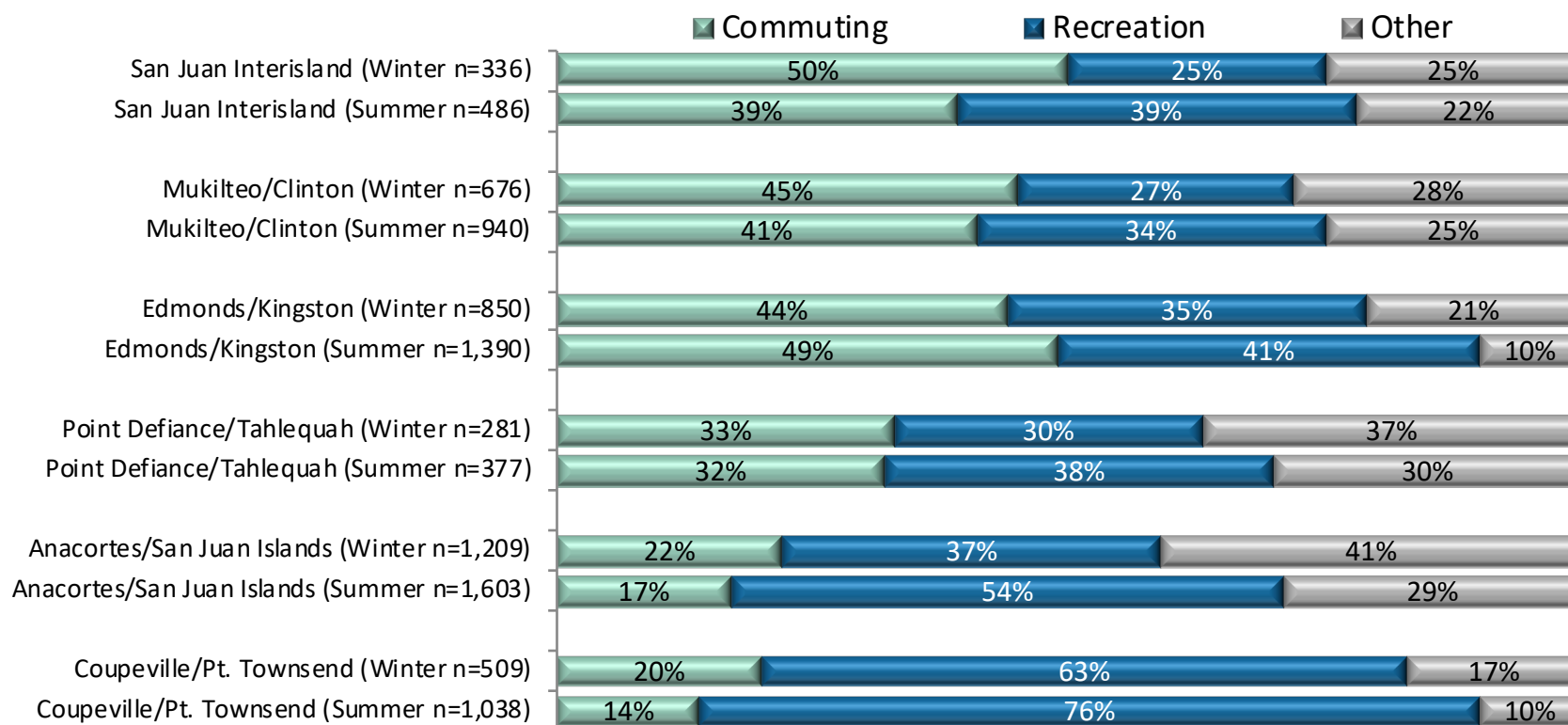


Q4. Approximately how many of those per month round trips, for each route, were for the primary purpose of commuting (getting to and from work/school), how many were primarily recreational/social purposes (seeing friends/going to events, etc.) and how many were for other purposes (shopping, medical appointments, etc.)?



All routes saw a change in the trip purpose between seasons. The least likely to see a change is the Seattle/Bainbridge route.

Trip Purpose by Route by Season (2 of 2)



Q4. Approximately how many of those per month round trips, for each route, were for the primary purpose of commuting (getting to and from work/school), how many were primarily recreational/social purposes (seeing friends/going to events, etc.) and how many were for other purposes (shopping, medical appointments, etc.)?



THANK YOU!

For More Information Contact:

Reema Griffith, WSTC Executive Director

Bill Young, Survey Program Project Manager

360.705.7070